

User maintenance

Quick Reference Guide

Purpose of this
documentThis guide is to help merchants with adding and deleting new staff to the Merchant Portal
and resetting passwords.

Adding new users

Step	Action					
1	Trading AS. SMP PVT - N: 1 Credit & Adjustment Voucher Address Details 2 Modify Unit No, Street No & Street 8 TANGIHUA Administration Type:* 3 Modify Suburb AUCKLAND Information Post Code* 1010 Add New Telephone Details		1. Log i <u>http</u> 2. Click 3. Click	in to Merchant Portal >> s://merchantportal.gemfinance.co.nz a on Administration on the left hand side-bar. a on Add New Staff on the left hand side-bar.		
2	. Enter in the following details:					
	Field			Action		
	First Name, Last Name Password Temporary Telephone No, Mobile No and Email addres			Enter the user's first and last name		
				Type the word Password into this field		
				Not mandatory		
	2. Tick the applicable boxes if the user needs additional access (generally sales staff will not have additional access, no boxes ticked). All staff have access to Deal Handler, <i>New Applications, Add On Sales</i> , and <i>eSalesVouchers</i> .					

3. Click on Register User.

Result: The *Add New Staff Confirmation* screen displays with the User Id, First Name, Last Name and Staff Access Level.

4. Give the user their User Id and default password (Password). Once the user has logged in they will be prompted to change their password using the password criteria (minimum of 8 characters, start and end with a letter and contain at least one number).

Password reset/modify or delete users

Step	Action				
1	 Follow action 1 and 2 in Step 1 of Adding New Users. Click on Password Reset & Modify Staff Details on the left hand side-bar. 				
2	Modify Staff D e tails member, please select a staff member from the drop down list below Please Select- Tania Batucan batucant0@090354256 Reon Campbell campbellr0@090354256 Andy Clark clarka@090354256 Ops Desk desko@090354256	 Click on the drop down box arrow to select staff member name and click on Retrieve. Continue with the applicable step below: To reset a password type Password into the <i>New</i> <i>Password</i> field. To update staff details or access edit the applicable fields/ check boxes. To delete a staff member click on Delete Staff Member after retrieving the staff details in Step 1. Click on Update Details. 			